

AGENDA
Executive Committee Meeting
CSUSM Academic Senate

Wednesday ~ September 29, 2010 ~ 12 noon - 2 p.m. ~ Kellogg 5207

[Send an email to
the faculty EC
members' listserv.](#)

I. Approval of Agenda

II. Approval of Minutes of 9/8/2010 & 9/15/2010

III. Chair's Report, [Rika Yoshii](#)

Referrals:

APC	Excess Units Seniors proposed policy: Discuss feasibility w/Advising staff (admin)
FAC	Reconcile CoAS RTP document with CBA vis-á-vis makeup of PRC (Yoshii) Review revised SoN policy on evaluation of temporary faculty (Boren)
UCC	C Form: Revise to make more user friendly for proposers and more useful administratively for translating the curriculum into what eventually gets coded into PeopleSoft (Barsky)

IV. Secretary's Report, Mohammad Oskoorouchi *The following items have been responded to by the university administration:*

FAC CoE Evaluation of Temporary Faculty Unit 3 Employees *Approved*

V. Provost's Report, Emily Cutrer

VI. [ASCSU](#) Report, [Brodowsky/Montanari](#)

VII. [CFA](#) Report, [Don Barrett](#)

VIII. ASI Board Meeting Report, Staci Beavers

IX. [Committee](#) Reports What are first-priority items for fall 2010?

X. Consent Calendar Item [NEAC](#) Recommendations

XI. Old Business None.

XII. New Business

[FAC](#) Sabbatical Leave policy revision

XIII. Information Items

[Charge](#) and final composition of Intellectual Property Task Force:

Don Barrett (CFA)	Pearl Ly (SAC)
Gerardo Gonzalez (OGSR)	Teresa Macklin (IITS)
Grant Hubbard (UARSC)	George Vourlitis (FAC)
Lori Walkington (ASI)	Aníbal Yáñez-Chávez (LATAC)

XIV. EC Members' Concerns & Announcements

Next meeting: October 6 ~ Commons 206

FAC: SABBATICAL LEAVE

Rationale: *The primary purpose for this revision is in response to PLC concerns that language regarding proposals and categories be clarified because existing language in the sabbatical policy was not specific enough with regard to proposals that are funded and those that are not. For example, page 4, line 154 through 163 has been changed to reflect **recommended** proposals or unusually good or timely opportunities. There would be an expectation that all of the recommended proposals would be funded. The second category is **conditionally recommended** with proposals indicating a high quality faculty project with funding based on availability of resources. Finally the last category: **not recommended** reflecting proposals that do not indicate a high-quality sabbatical leave project. Recent history indicates these changes originated from individuals whose recommended proposals were not funded. The clarification in 3 b. or line 158 where we specify **conditionally recommended** contingent upon the availability of resources will better indicate to individuals the possibility that their sabbatical projects may not be funded. In a few other places in the document specifically lines 105, 174, and line 178 add faculty recommended or **conditionally recommended** to the language for consistency throughout the rest of the document. You can find these changes also in lines 208 and line 214. Finally, in reviewing the documents, the faculty affairs committee noted language that can be updated to better reflect the CSUSM mission in regard to 21st century higher education and recommends making gender neutrality adjustments in our documents as they are reviewed. For example the use of the “word” s/he can be considered antiquated and so in the cases where the word shows up we have changed the word to ‘the individual’ and in places where his/her appears, we have adjusted the sentence to be more inclusive and gender-neutral.*

Definition: A policy governing the application for and award of sabbatical leaves.

Authority: The collective bargaining agreement between the California State University and the California Faculty Association.

Scope: Eligible faculty unit employees of CSU San Marcos.

I. AUTHORIZATION

Sabbatical leaves are authorized under Article 27 of the Collective Bargaining Agreement.

II. OBJECTIVE

Sabbatical leaves shall be for purposes that provide a benefit to CSUSM through research, scholarly and creative activity, instructional improvement and faculty retraining. Such activities provide a crucial benefit to the instructional needs of CSUSM by improving the competency and enthusiasm of the faculty, by keeping the faculty up-to-date in their fields, and by bringing new ideas and concepts to the campus which will be shared with students and other faculty in and out of the classroom. Sabbatical activities also benefit society and promote the reputation of the university by giving CSUSM faculty a chance to refine ideas developed at CSUSM and spread them to the national and international creative, scholarly and educational communities.

III. ELIGIBILITY

A full-time faculty unit employee shall be eligible for sabbatical leave if:

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1. ~~S/he~~The individual has served full-time for six (6) years at CSU, San Marcos in the preceding seven (7) year period prior to the leave; and
2. ~~S/he~~The individual has served full-time at least six (6) years after any previous sabbatical leave or difference in pay leave¹.

Note:

- A. Credit granted towards completion of the probationary period for service elsewhere shall also apply towards fulfilling the eligibility requirements for sabbatical.
- B. A leave of absence without pay or service on an academic administrative appointment excluded from the bargaining unit shall not constitute a break in service for eligibility requirements.
- C. For tenure track faculty, final approval of a sabbatical leave is contingent upon having earned tenure.

IV. SALARY

The salary of a faculty employee on a sabbatical leave shall be in accordance with the following:

1. One (1) semester at full salary; or
2. Two (2) semesters at one-half (1/2) the full salary.

V. SSP-ARs

All full time SSP-ARs are eligible to apply for sabbaticals.

The process for SSP-ARs will be the same as it is for instructional faculty with the following exceptions:

The Professional Leave Committee will evaluate the applications separately from the instructional faculty and assign them to one of the categories identified in Section VII. C.

The Professional Leave Committee will submit their report to the Vice President for Student Affairs instead of the Vice President for Academic Affairs.

VI. APPLICATION PROCESS

- A. Sabbatical leaves are awarded the year prior to the sabbatical leave itself. Each spring semester, faculty who are eligible to apply for a sabbatical leave shall be notified of their eligibility and the application submission date for the Fall semester. A copy of the notification shall be sent to the Dean and the Department Chair or equivalent². In order to facilitate resource planning, faculty

¹Difference in Pay Leaves. Academic employees who have completed at least six consecutive academic years of service may be granted a leave of absence for one or more semesters not exceeding one year, with compensation equal to the difference in salary between that received by the person on leave and minimum salary of the instructor rank.

² A faculty member not belonging to a "department" has an appropriate administrator, for example a Center

66 are asked to notify the Dean and Department Chair (or equivalent) as soon as they make the
67 decision to apply for a sabbatical leave.

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69 B. An application for a sabbatical leave shall include the following:
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- 71 1. A 3 to 5 page narrative which states the purpose of the sabbatical leave and gives a
72 detailed description of the applicant's plan of study, research, travel, and/or service.
73 This narrative shall include the following:
 - 74 a. A full description of the proposed activities including a timeline, and, if
75 appropriate, a description of the methodology, and/or course of study (or other
76 types of activities). The activities proposed should be of a nature to clearly
77 make full use of the applicant's working time for the duration of the sabbatical
78 leave.
79
 - 80 b. An explanation of how the project positively impacts the applicant's
81 professional development (including the ability to carry out responsibilities at
82 CSUSM). The applicant should put the professional development into context.
83 For example, if the proposed activity involves a course of research, the
84 applicant should explain whether it represents a continuation of ongoing
85 research or a change in direction; likewise, if the proposed activities are
86 directed at instructional improvement, the applicant should describe the
87 courses which will benefit and how they will benefit from the proposed
88 activities.
89
- 90 2. A statement specifying the CSU resources (e.g., the need to use one's faculty office/lab,
91 the need to secure an internal grant, or the need for travel funds), if any, necessary to
92 carry it out;
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- 94 3. A statement of the time requested, which shall not exceed one (1) year;
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96 Note: A sabbatical leave of two (2) semesters may be implemented within a two (2)
97 consecutive year period.
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- 99 4. A copy of the applicant's curriculum vitae and a copy of original reports for previous
100 sabbatical leaves (see Section VIII, Paragraph 4 below).
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- 102 5. Applicants who have been recommended [or conditionally recommended](#) for a
103 sabbatical but not funded in any of the previous two years may also include copies of
104 previous recommendations from the Professional Leave Committee for one or both of
105 the previous two years.
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108 C. The application (9 copies) shall be submitted to the Professional Leave Committee via the Office
109 of the Academic Senate. The Office of the Academic Senate shall distribute seven copies to the
110 Professional Leave Committee, one copy to the Associate Vice President for Academic Affairs -
111 Academic Resources office and one copy to the applicant's department (or equivalent unit).
112

Director or a Program Director, who functions as the equivalent of the Department Chair for the purposes of this document.

- 113 D. A difference in pay leave may be filed simultaneously with a request for a sabbatical leave
114 according to academic unit policy and procedures but only one type of leave may be granted.
115

116 VII. EVALUATION PROCESS
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- 118 A. A Professional Leave Committee shall review sabbatical applications, considering questions
119 related to the quality of the proposed sabbatical leave project.
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- 121 1. The Professional Leave Committee shall be constituted as follows:
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- 123 a. The Professional Leave Committee shall be elected on an annual basis by
124 probationary and tenured faculty unit employees.
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126 b. The Professional Leave Committee shall be an all university committee
127 composed of full-time tenured professors.
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129 c. One member shall be elected from the faculty by the eligible faculty in each of
130 the following areas: Education, Business, Science and Mathematics, Humanities
131 and Fine Arts, the Social Sciences, the Library. One at-large representative shall
132 be elected from the faculty as a whole.³
133
134 d. Faculty unit employees applying for a sabbatical leave shall not be eligible for
135 election to the Professional Leave Committee.
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- 137 2. The Professional Leave Committee shall use the following criteria listed in order of
138 importance in evaluating the merit of proposals:
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- 140 a. The quality of the professional development of the applicant through research,
141 scholarly and creative activity, instructional improvement or faculty renewal
142 with no implied priority among these (including the impact on the faculty
143 member's ability to carry out ~~his/her~~ responsibilities to CSUSM).
144
145 b. The quality of the proposal in terms of clarity, purpose, methods, and
146 objectives.
147

- 148 3. The Professional Leave Committee shall group proposals into the following categories:
149

- 150 a. ~~Highly~~ Recommended: Exceptionally Proposals that indicate exceptionally high
151 quality projects or ~~projects which represent an~~ unusually good or timely
152 ~~opportunity~~ opportunities. The expectation is that all Recommended proposals
153 will be funded.
154
155 b. Conditionally Recommended: Projects-Proposals that indicate a high quality
156 sabbatical leave project. Funding of these proposals is based on the availability
157 of resources.
158
159 c. Not Recommended ~~Against~~: Projects-Proposals that do not indicate a high
160 quality sabbatical leave project.

³ The distribution of areas was chosen to parallel the University Retention, Tenure, and Promotion committee.

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162 The Professional Leave Committee shall recommend against all proposals whose
163 proposed activities are not of a nature to account for all of the applicant's working time
164 for the duration of the sabbatical leave.

165
166 The *Highly-Recommended* category should be a small, select group. In no case should
167 more than 25% of the proposals be assigned to this category.

- 168
169 4. The Professional Leave Committee shall rank order all applications in the *Conditionally*
170 *Recommended* Category (this information will not be included in the letter sent to the
171 applicant).
- 172
173 5. The Professional Leave Committee shall submit a letter for each application to the Vice
174 President for Academic Affairs giving the following information (a) the category of
175 recommendation (*Highly-Recommended*, *Conditionally Recommended*, or *Not*
176 *Recommended-Against*), (b) the reasons for the recommendation, and (c) suggestions
177 for improvement (if needed). The Professional Leave Committee shall also submit to the
178 Vice President for Academic Affairs the rank order of applications in the category.

179
180 A copy of this letter shall be given to the applicant. The applicant shall be informed that
181 a positive recommendation by the Professional Leave Committee does not guarantee
182 that the sabbatical Leave will be approved by the President.

183
184 Applicants may respond in writing to the VPAA regarding the committee's
185 recommendation within two weeks of receipt of the recommendation.

- 186
187 B. The Senate Office shall send a copy of the application to the faculty unit employee's
188 department (or equivalent unit). The department (or equivalent unit) shall provide a statement
189 to the Vice President for Academic Affairs (with a copy to the Dean) regarding the possible
190 effect on the curriculum and the operation of the department (or equivalent unit) should the
191 employee be granted a sabbatical.
- 192
193 C. The Vice President for Academic Affairs shall make a recommendation to the President
194 regarding each sabbatical leave application.
- 195
196 1. After reviewing the recommendations of the Professional Leave Committee, the Vice
197 President for Academic Affairs may meet and confer with the Professional Leave
198 Committee for clarification.
- 199
200 2. The Vice President for Academic Affairs, in consultation with the appropriate deans,
201 shall consider other campus program needs and campus budget implications. In
202 particular, the distribution of sabbatical leaves among different academic units may be
203 considered (taking into account such factors as the FTES, FTEF, number of eligible
204 faculty, number of faculty applying, and the number of faculty recommended *or*
205 *conditionally recommended* by the Professional Leave Committee in each unit).
- 206
207 3. When resources do not allow funding of all sabbatical leaves of a given category or
208 subcategory of recommendation, the Vice President for Academic Affairs shall also take
209 into account the number of years (since the applicant's previous sabbatical leave, if any)
210 an applicant has been eligible for sabbatical leave as well as the number of years the

211 | applicant has been recommended or conditionally recommended for a sabbatical leave
212 by the Professional Leave Committee, but not awarded.

- 213
- 214 4. Arrangements may be developed by the department and approved by the President to
215 accommodate granting sabbatical leaves for faculty unit employees whose leaves have
216 been approved. Such arrangements may include rearranging workload within the
217 department, and other university funding. No faculty unit employee will be involuntarily
218 required to work in an overload situation by such arrangements.
- 219
- 220 5. The recommendation of the Vice President for Academic Affairs shall be forwarded to
221 the President with copies to the applicant, the Dean, the department (or equivalent),
222 and the Professional Leave Committee. The letter should contain reasons for the
223 recommendation.

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225 VIII. APPROVAL

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- 227 A. The President or the President's designee shall respond in writing to the applicant and shall
228 include the reasons for approval or denial. If a sabbatical leave is granted, the response shall
229 include any conditions of such a leave. A copy of this response shall be provided to the affected
230 department (or equivalent unit), the Dean, the Vice President for Academic Affairs and the
231 Academic Senate Office for the Professional Leave Committee.
- 232
- 233 B. Final approval of a sabbatical leave shall not be granted until the applicant has filed with the
234 President a suitable bond or an accepted statement of assets (not including PERS holdings)
235 and/or a promissory note that is at least equal to the amount of salary paid during the leave.
- 236
- 237 C. The guarantee posted shall indemnify the State of California against loss in the event the
238 employee fails to render the required service in the CSU following return of the employee from
239 the sabbatical leave.
- 240
- 241 D. The guarantee posted shall immediately be canceled in full upon completion of required service
242 or upon waiver of that service by mutual agreement of the faculty member and the CSU.
- 243
- 244 E. A faculty unit employee whose leave requested has been approved shall normally be granted
245 that leave. A leave may be deferred up to one year in circumstances when the President or the
246 President's designee determines that granting the sabbatical leave in the succeeding academic
247 year would cause an undue hardship on the department's ability to offer its program.

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249 IX. FACULTY RESPONSIBILITIES

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- 251 A. A faculty unit employee on a sabbatical leave shall not accept additional and/or outside
252 employment without prior approval of the president or the President's designee.
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- 254 B. A faculty unit employee granted a sabbatical leave may be required by the president to provide
255 verification that conditions of leave were met. The statement of verification shall be provided
256 to the president and the Academic Senate office for the Professional Leave Committee.
- 257
- 258 C. A faculty unit employee shall render service to the CSU upon return from a sabbatical leave at
259 the rate of one (1) term of service for each term of leave.
- 260

261 D. A faculty member, upon return from sabbatical, shall submit a written report of approximately
262 one page to the department (or equivalent unit) and Dean describing accomplishments during
263 the period of leave.

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265 X. FACULTY RIGHTS

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267 A. It is the intent of this policy that faculty unit employees eligible for sabbatical leave who meet
268 the conditions of this policy receive their sabbatical leave.
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270 B. Faculty on a sabbatical leave may not serve on university-wide committees. However, faculty
271 on a sabbatical leave may vote in university-wide elections and run for university-wide offices
272 for which they are eligible. The voting rights and committee service restrictions of an individual
273 on sabbatical, within their college, department, or program, should be decided by the
274 college/department/program and included in pertinent governance documents.
- 275
276 C. A faculty unit employee on a sabbatical leave shall be considered in work status and shall
277 receive health, dental, and appropriate fringe benefits provided by the CSU in the same manner
278 as if ~~s/he~~the individual were not on a sabbatical leave.
- 279
280 D. A faculty unit employee on a sabbatical leave shall be entitled to accrue sick leave, vacation,
281 and service credit toward merit salary adjustment, eligibility toward promotion, if applicable,
282 and seniority credit.
- 283
284 E. If approved leaves are deferred, in succeeding years first preference for leave shall be given to
285 faculty whose leave applications were approved in the earliest prior year.

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287 XI. TIMELINE

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289 **May of year before request process begins**
- 290 - Associate Vice President for Academic Affairs - Academic Resources notifies eligible
 - 291 faculty
 - 292 - NEAC constitutes the Professional Leave Committee.

- 293
294 **Last business day of September**
- 295 - 9 copies of application due in Office of the Academic Senate. (Senate provides 1
 - 296 copy to Associate Vice President for Academic Affairs and 1 copy to the department
 - 297 (or equivalent unit)

- 298
299 **First business day of October**
- 300 - Associate Vice President for Academic Affairs - Academic Resources requests impact
 - 301 statement from the department (or equivalent unit)

- 302
303 **Last business day of October**
- 304 - Professional Leave Committee forwards recommendations to Vice President for
 - 305 Academic Affairs with a copy to applicant
 - 306 - Impact statements due to Vice President for Academic Affairs with a copy to
 - 307 applicant

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309 ~~Last business day of November~~

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~~—Vice President for Academic Affairs forwards recommendation to President with copies to the department (or equivalent unit), the Dean, the Office of the Academic Senate for the Professional Leave Committee and the applicant.~~

Last day of Fall semester

- President [or designee](#) notifies candidates of sabbatical decisions with copies to the department (or equivalent unit), the Dean and the Office of the Academic Senate for the Professional Leave Committee